

## **Estimating Potential Visitorship and Expenditures from the Proposed Whitewater Park near Siloam Springs**



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## EXECUTIVE SUMMARY

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The proposed whitewater and mountain biking park at the old Lake Frances dam site will prove to be an important recreational amenity for the City of Siloam Springs and the Northwest Arkansas region. While it is not possible to effectively calculate the true value of the park as a regional amenity, this study provides estimates of the potential numbers of visitors to the park and their associated spending in Siloam Springs. These numbers will allow leaders at the City of Siloam Springs and the Walton Family Foundation to make informed decisions about the operations of such a park.

- **The number of likely annual visits to the proposed park is estimated at 191,280.**
  - 97,876 of these visits come from whitewater kayaking and mountain biking participants in Northwest Arkansas. It is assumed that 75 percent of the pool of Northwest Arkansas participants would each visit the park 8.1 times in a year.
  - 93,404 whitewater kayaking and mountain biking participants from within the 100 mile and 200 mile radius of the park are likely to visit the park once. These visitors represent 50 percent of the whitewater kayaking and mountain biking participants from the 100 mile radius and 25 percent of the participants from the 200 mile radius
  - If the mountain biking features are not included in the park, the likely number of visits would drop to 37,193.
  - Under the optimistic assumption that the entire pool of potential whitewater kayakers and mountain bikers from Northwest Arkansas visit the park 8.1 times each and all the potential pool of whitewater kayakers and mountain bikers from the 100 mile and 200 mile radius come to the park once, attendance would increase to 424,314.
- **Total spending in Siloam Springs from the likely 191,280 visits is estimated at \$7.45 million annually.**
  - \$1.21 million of this spending comes from potential visitors who are residents of other Northwest Arkansas cities, while \$6.24 million is generated by potential visitors from within the 100 mile and 200 mile radius of the park.
  - The likely visitors to the park are also estimated to spend an additional \$2.74 million on concessions at the park.
  - Using the more optimistic assumption of visitorship, overall spending in Siloam Springs rises to an estimated \$21.25 million and estimated concession spending rises to \$6.16 million.
  - If the mountain biking features are not included, likely kayaking visitor spending in Siloam Springs would drop to \$1.45 million and likely concession spending would drop to \$529,962.

- **Estimated sales tax revenues of \$149,050 and hotel/motel tax revenues of \$8,583 would accrue to the City of Siloam Springs from the likely visitors.**
  - Only \$14,905 of the sales tax revenues will be available to the City of Siloam Springs and can be appropriated towards maintenance and operations of the park.
  - If the more optimistic visitorship numbers are achieved, estimated sales tax revenues rise to \$425,006 and estimated hotel/motel taxes rise to \$26,999 in the City of Siloam Springs.
  - If only kayaking visitors are considered, total estimated sales tax revenues drop to \$28,982 (with only \$2,898 available for maintenance and operations of the park) and estimated hotel/motel tax revenues drop to \$1,669.

Visitorship and Spending Estimates			
Category	Likely Visitor Estimate	Optimistic Visitor Estimate	Kayaking Park Visitors Only
Visits from Other Northwest Arkansas Cities	97,876	130,501	19,031
Visits from within 100 mile and 200 mile radius	93,404	293,813	18,162
Total Visits	191,280	424,314	37,193
Spending in Siloam Springs	\$7,452,522	\$21,250,314	\$1,449,101
Siloam Springs Sales Tax Revenues	\$149,050	\$425,006	\$28,982
Siloam Springs Hotel/Motel Tax Revenues	\$8,583	\$26,999	\$1,669
Concession Sales at the Park	\$2,725,520	\$6,155,757	\$529,962

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## INTRODUCTION

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The City of Siloam Springs, in partnership with the Walton Family Foundation and other entities, is considering plans for a new whitewater and mountain biking park. The park is expected to be developed at the old Lake Frances dam across the state border in Oklahoma. This proposed park will feature international race class whitewater kayaking, mountain biking trails, parking, picnic tables, and other amenities. The city is working with the Center for Business and Economic Research to understand the potential demand for such an amenity in Siloam Springs and the associated spending patterns of visitors to the proposed whitewater kayaking and mountain biking park.

While the proposed whitewater and mountain biking park will prove to be an important recreational amenity for the City of Siloam Springs and the Northwest Arkansas region, it is not possible to effectively calculate the true value of the park as a regional amenity. This study, however, provides estimates of the potential numbers of visitors to the park and their associated spending in Siloam Springs. These numbers will provide leaders at the City of Siloam Springs and the Walton Family Foundation some insights about potential revenues that can be generated from the operations of such a park.

This study begins with a review of visitorship and feasibility studies for other whitewater parks in the United States and summarizes some of the results of those studies and their methodologies. A summary of a survey of potential whitewater kayakers and mountain bikers, conducted by the Center for Business and Economic Research in February and March 2016, is provided. The survey was distributed among regional associations and groups related to whitewater kayaking and mountain biking and was designed to collect important information about the spending patterns of potential visitors. The pool of potential visitors to the park was then calculated using the populations of the region and the proportion of the population that participate in whitewater kayaking and mountain biking. These estimates of potential visitors and the spending patterns from the survey results were then used to calculate the likely spending that would occur in Siloam Springs if some of the potential pool of visitors were to visit the park. The study also compiled a review of the existing tourism capacity in Siloam Springs, specifically hotels and restaurants, which would be the primary recipients of the spending of likely park visitors. The spending patterns of likely visitors were used to generate estimates of sales tax and hotel/motel tax collections that would accrue to the City of Siloam Springs. Finally, a summary of the main results of the study is provided.

While comparing this report with others, it is important to understand the various limitations of carrying out such a study. The whitewater and mountain biking park is in its early stages of development and potential visitors have varying levels of knowledge about the type of park or its capacities for whitewater kayaking or mountain biking. Once the park actually opens, interest in the whitewater kayaking and mountain biking facilities may differ from interest levels expressed by survey respondents. Other similar parks that are currently in operation are also co-

located with downtown areas of the cities that operate and can take advantage of all the amenities that those downtowns offer. The proposed park, which is physically in Oklahoma, is some distance away from downtown Siloam Springs, although visitors may drive through parts of Siloam Springs to visit the park. Finally, an important caveat of this study is that calculations of spending and tax collected in Siloam Springs are based on estimates of likely visitors. If the number of likely visitors varies significantly from the numbers presented, the estimates of spending and taxes collected will also vary.

## LITERATURE REVIEW

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In this section of the report, researchers from the Center for Business and Economic Research identified studies that attempt to estimate visitorship and economic impact of other similar whitewater recreation facilities. In particular, researchers highlight five particular studies that measured visitorship and economic impact at Kelly Whitewater Park, Grand Rapids Whitewater Project, Clear Creek Whitewater Park, the Oklahoma City Whitewater Park, and the Chattahoochee River Restoration.

A 2012 study of Kelly Whitewater Park in Cascade, Idaho by the University of Idaho Extension calculated the economic impact of the Whitewater Park in 2011 during the park's second year of operation. As the park was an ongoing concern, the study estimated the size of visitorship by counting the number of cars entering the park and combining that information with survey data about the average party size. Using this methodology and input from park staff, the study estimated that the Kelly Whitewater Park had around 40,000 unique daily visitors and 37.5 percent of them were visitors to the county. These visitors to the county produced an economic impact of approximately \$600,000 with a tax impact of around \$84,000 equally divided over state and federal receipts.

In the 2014, the Anderson Economic Group conducted a study to estimate the economic benefits of the Grand Rapids Whitewater Project, which would engage in restoration of the Grand River in Grand Rapids, Michigan. The restoration project was intended to enhance fishing, whitewater kayaking, and other boating and shore based recreation uses of the Grand River and its banks. The study estimated that the river restoration efforts would generate between 232,434 and 538,313 new visitor days through all these activities for the city of Grand Rapids each year. A variety of different methods were used in the study to estimate the overall visitorship, but in particular, the Anderson Economic Group estimated the visitorship from whitewater boating by extrapolating from whitewater boating visitorship at similar facilities in cities of a similar size. Using the overall visitorship numbers and estimates on spending, study estimates that the Grand River restoration project will generate between \$15.9 million and \$19.1 million per year.

Status Consulting evaluated the economic impact of the Clear Creek Whitewater Park in Golden, Colorado in 2000. The study estimated visitorship from non-event days at 13,170 user days by getting estimates from park staff and estimating users based on the flow level. In addition,

attendance data collected from event organizers put the event visitorship at 510 user days. This combined visitorship was estimated to generate revenues of \$913,545 to \$1.15 million per year based on study estimates of expenditures between \$67 and \$81 per person.

The economic and revenue impacts of the Whitewater Park proposed in Oklahoma City were estimated by Applied Economics in 2009. The study estimated the overall number of visitors and economic impact that will be generated by the project, which in addition to the whitewater park, will include on-site retail, restaurants and conference facilities. Based on an overall visitorship estimate of 230,000 to 260,000 people per year and an out-of-region visitorship estimate of 60,000 people per year, the study estimated an annual economic impact from visitors of \$13.8 million. Both the operations of the entire whitewater park facility and visitor spending is estimated to generate \$1.1 million in local taxes and \$1.1 million in state taxes.

Daniels and Lazzara assessed the potential market and economic impact of the Chattahoochee River Restoration in Columbus Georgia and Phenix City, Alabama. The study estimated that the average visitorship to the park would be between 60,000 and 100,000 patrons annually. These figures were calculated by using estimates of recreational and whitewater kayaking participants from the annual Outdoor Industry Association Participants Survey. The survey provides a percentage of the national and regional populations that participate in these kayaking facilities. Using this percentage and populations within certain distance rings from the Chattahoochee River Restoration, this study was able to estimate the possible number of annual patrons. These visitorship numbers were combined with the Georgia Department of Tourism visitor expenditure estimates to calculate the overall visitor impact at between \$4.2 million and \$7.0 million.

In this study, researchers from the Center for Business and Economic Research estimate possible visitorship at the Siloam Springs whitewater and mountain biking park following a similar methodology as the Chattahoochee River Restoration study cited above. The estimates of visitor spending come from a survey of interested kayakers and mountain bikers who were surveyed by the Center for Business and Economic Research in February and March 2016. The results of that survey are presented in the next section.

## RESULTS OF THE SILOAM SPRINGS WHITEWATER AND MOUNTAIN BIKING PARK POTENTIAL VISITOR SURVEY

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Identifying the spending patterns of potential visitors to the proposed whitewater and mountain biking park in Siloam Springs is a key focus of this study. Estimating the spending of these visitors at the proposed facility is achieved through the collection of primary data in the form of survey responses. Researchers from the Center for Business and Economic Research developed a survey instrument that was disseminated to various regional associations of whitewater kayaking and mountain biking enthusiasts and competitors. The survey results provide researchers with important insights into the likely frequency of visits, the spending that would occur within Siloam Springs, and the lodging and meal plans of visitors. The data collected from this survey, a copy of which can be found in the appendix, allow researchers to extrapolate the spending of all potential visitors to the proposed whitewater and mountain biking facility. In this section of the report, a brief summary of the survey results is provided.

93 surveys, representing 303 people, were completed. The vast majority of survey respondents who expressed interest in the proposed facility come from within the state of Arkansas. 3.6 percent of the total respondents are from Siloam Springs and 62.4 percent of the respondents are from cities in Arkansas outside of Siloam Springs. The next largest contingent of survey respondents come from Oklahoma residents, with 20.8 percent, while responses from Missouri and Texas follow with 5.6 percent and 4.6 percent respectively.

TABLE 1: SURVEY RESPONDENTS BY PLACE OF ORIGIN

Survey Respondents by Place of Origin	
Siloam Springs, Arkansas	3.6%
Arkansas (excluding Siloam Springs)	62.4%
Oklahoma	20.8%
Missouri	5.6%
Texas	4.6%
Other State	3.0%

Nearly 48 percent of the survey respondents from outside Northwest Arkansas have no plans to stay in Siloam Springs or Northwest Arkansas after participating in whitewater kayaking or mountain biking at the proposed facility. Just over 39 percent of the respondents expect to stay in Siloam Springs after visiting the proposed development, and nearly 13 percent of the respondents plan on staying in another Northwest Arkansas city. Meanwhile, respondents from the Northwest Arkansas region reported that they would visit the park an average of 8.1 times in a year.

TABLE 2: OUTSIDE NWA SURVEY RESPONDENTS BY NUMBER OF VISITS AND OVERNIGHT STAY

<b>Outside NWA Survey Respondents by Number of Visits and Overnight Stay</b>	
<b>Overnight Plans</b>	<b>Percent</b>
<b>Not Staying Overnight</b>	47.9%
<b>Staying in Siloam Springs</b>	39.4%
<b>Staying in Other NWA City</b>	12.8%

The overwhelming majority, 96.6 percent of respondents, express interest in the kayaking amenities at the proposed whitewater park in Siloam Springs. Researchers at the Center for Business and Economic Research would like to note that the survey was disseminated most widely among kayaking enthusiasts, which helps explain this overwhelming preference. 56.3 percent of the respondents are interested in mountain biking trails and 55.2 percent are interested in hiking trails at the proposed facility. 23.0 percent of the survey respondents express interest in disc golf amenities.

TABLE 3: PARK AMENITIES PREFERRED BY SURVEY RESPONDENTS

<b>Park Amenities Preferred by Survey Respondents</b>	
<b>Kayaking</b>	96.6%
<b>Mountain Biking</b>	56.3%
<b>Disc Golf</b>	23.0%
<b>Hiking Trails</b>	55.2%

69.0 percent of the respondents prefer access to snacks and beverages at the proposed park while 57.5 percent express an interest in using the parking facility. 49.4 percent of the respondents are interested in meals. 16.1 percent are interested in renting mountain bikes and related equipment, while 26.4 percent of the respondents are interested in renting kayaks and related equipment.

TABLE 4: PARK CONCESSIONS PREFERRED BY SURVEY RESPONDENTS

<b>Park Concessions Preferred by Survey Respondents</b>	
<b>Snacks and Beverages</b>	69.0%
<b>Meals</b>	49.4%
<b>Rent Kayaks/Equipment</b>	26.4%
<b>Rent Mountain Bikes/Equipment</b>	16.1%
<b>Parking</b>	57.5%

Data collected from survey respondents provide researchers with per person spending estimates for the visitors to the proposed park in Siloam Springs. The Northwest Arkansas residents report that they would spend an average of \$13.63 on concessions at the park and \$12.36 elsewhere in

Siloam Springs during each of their visits. The visitors from outside Northwest Arkansas who did not plan to stay overnight respond that they would spend an average \$8.99 on concessions at the park and \$13.56 elsewhere in Siloam Springs during each of their visits. The respondents who planned to stay overnight in Siloam Springs report that they would spend an average \$23.44 on concessions at the park and \$145.20 elsewhere in Siloam Springs. Finally, the respondents who planned to stay overnight in another Northwest Arkansas city expect that they would spend an average \$10.71 on concessions at the park, \$25.00 elsewhere in Siloam Springs and \$45.83 in another Northwest Arkansas city. These numbers provide researchers with estimates on how much spending would likely occur within the park, providing revenues to the city and concession operators, and how much related spending would likely occur from visitors within Siloam Springs, contributing to sales and hotel/motel taxes for the city.

TABLE 5: SURVEY RESPONDENTS' SPENDING PATTERNS BY OVERNIGHT STAY

Survey Respondents' Per Person Spending Patterns by Overnight Stay Plans			
Overnight Plans	Concessions Spending	Spending in Siloam Springs	Spending Elsewhere in NWA
<b>NWA Residents</b>	\$13.63	\$12.36	-
<b>Not Staying Overnight</b>	\$8.99	\$13.56	-
<b>Staying in Siloam Springs</b>	\$23.44	\$145.20	-
<b>Staying in Other NWA City</b>	\$10.71	\$25.00	\$45.83

Based on responses to the survey, researchers from the Center for Business and Economic Research estimate that, on average, each visitor from outside Northwest Arkansas who plans to stay in Siloam Springs would occupy 0.32 rooms for 0.35 nights per person. These respondents would also consume 5.91 meals on average between breakfast, lunch, and dinner. Respondents who plan to stay in another Northwest Arkansas city would occupy 0.08 rooms for 0.13 nights. These respondents would consume a total of 4.54 meals in Northwest Arkansas during their stays.

TABLE 6: SURVEY RESPONDENTS' PER PERSON HOTEL OCCUPANCY BY OVERNIGHT STAY

Survey Respondents' Per Person Hotel Occupancy by Overnight Stay		
Overnight Plans	Rooms	Nights
<b>Staying in Siloam Springs</b>	0.32	0.35
<b>Staying in Other NWA City</b>	0.08	0.13

TABLE 7: SURVEY RESPONDENTS' PER PERSON MEALS BY OVERNIGHT STAY

<b>Survey Respondents' Per Person Meals by Overnight Stay</b>				
<b>Overnight Plans</b>	Breakfast	Lunch	Dinner	Total
<b>Staying in Siloam Springs</b>	1.68	1.65	2.58	5.91
<b>Staying in Other NWA City</b>	1.08	1.50	1.96	4.54

Respondents to the surveys from outside Northwest Arkansas also provide information about the plans of their parties during their visit. The information derived from the surveys about the plans of visitors is provided by overnight stay plans in either Siloam Springs or other Northwest Arkansas cities. All the respondents in both cohorts expect to purchase fuel during their stays. 71.4 percent of the respondents who plan to stay in Siloam Springs report that they are likely to purchase groceries, 47.6 percent report that they are likely to purchase packaged liquor, and 42.9 percent report that they are likely to go to a bar in Siloam Springs. Among the respondents who plan to stay in other Northwest Arkansas cities, 45.5 percent report that they are likely to purchase packaged liquor while 36.4 percent report that they are likely to go to a bar in another Northwest Arkansas city.

TABLE 8: SURVEY RESPONDENTS' OTHER SPENDING PLANS

<b>Survey Respondents' Other Spending Plans</b>		
<b>Overnight Plans</b>	Staying in Siloam Springs	Staying in Other NWA City
<b>Purchase Fuel</b>	100.0%	100.0%
<b>Retail Shopping</b>	38.1%	27.3%
<b>Buy Groceries</b>	71.4%	18.2%
<b>Purchase Packaged Liquor</b>	47.6%	45.5%
<b>Rent a Vehicle</b>	0.0%	0.0%
<b>Use a Taxi</b>	0.0%	0.0%
<b>See a Movie</b>	14.3%	0.0%
<b>Go to a Bar</b>	42.9%	36.4%

## ESTIMATING VISITORSHIP AT THE PROPOSED WHITEWATER AND MOUNTAIN BIKING PARK

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Estimating the total number of visitors to the proposed whitewater and mountain biking park is an important component of measuring the revenues generated by the proposed facility. The hypothetical nature of the proposed amenity makes estimating attendance a challenging endeavor. However, as discussed in the literature review section and following work done in other studies, researchers from the Center for Business and Economic Research estimate the number of visitors by using two primary sources: the 2014 Outdoor Participation Report and the population summary of the surrounding region compiled by ESRI.

The 2014 Outdoor Participation Report is an annual study compiled by The Outdoor Foundation, a 501(c)(3) not-for-profit group that was established by the Outdoor Industry Association. Interviews carried out with a national sample of individuals and households with more than one million members are used in the compilation of the annual study. The study reports the outdoor participation rates of individuals for a broad spectrum of activities that include mountain biking, camping, fishing, kayaking, hunting, skiing, and others. Of particular interest to the proposed park in Siloam Springs is the participation of the general public in whitewater kayaking and mountain biking activities.

According to the Outdoor Participation Report, as of 2013, 2.9 percent of the population over the age of six engages in mountain biking activities and 0.7 percent of the population engages in whitewater kayaking. The proportion of the population participating in mountain biking grew by 0.4 percentage points between 2007 and 2013 while the proportion of the population engaging in whitewater kayaking grew by 0.3 percentage points during the same period. These numbers provide the estimates for the proportion of the regional population that would be interested in the proposed whitewater and mountain biking facility in Siloam Springs.

TABLE 9: OUTDOOR ACTIVITY PARTICIPATION OF POPULATION AGE 6+

Outdoor Activity Participation of Population Age 6+		
Year	Mountain Biking	Kayaking (Whitewater)
2007	2.5%	0.4%
2008	2.7%	0.4%
2009	2.5%	0.5%
2010	2.5%	0.6%
2011	2.4%	0.5%
2012	2.7%	0.7%
2013	2.9%	0.7%

Researchers from the Center for Business and Economic Research conservatively estimate that the pool of potential visitors to the mountain biking and whitewater facility in Siloam Springs

would come from the immediate region, i.e. Northwest Arkansas, and the populations from a 100 mile and 200 mile radius around the region.<sup>1</sup> Using the proportion of the population that participate in mountain biking and whitewater kayaking from the Outdoor Participation Report's latest numbers, researchers are able to estimate the number of potential visitors to the proposed facility in Siloam Springs. The population statistics for the 100 mile radius and 200 mile radius are generated by ESRI using 2009-2013 numbers, while the population estimate for Northwest Arkansas is acquired from the U.S. Census Bureau. In the Northwest Arkansas region, there are an estimated 12,978 mountain biking participants and 3,133 whitewater kayaking participants. Considering the entire population in the 100 mile and 200 mile radius of the proposed facility, there are 249,661 mountain biking participants and 60,263 whitewater kayakers, for a total of 309,924 participants. A map of the region that is within the 100 mile radius and 200 mile radius from the proposed park is shown in Figure 1.

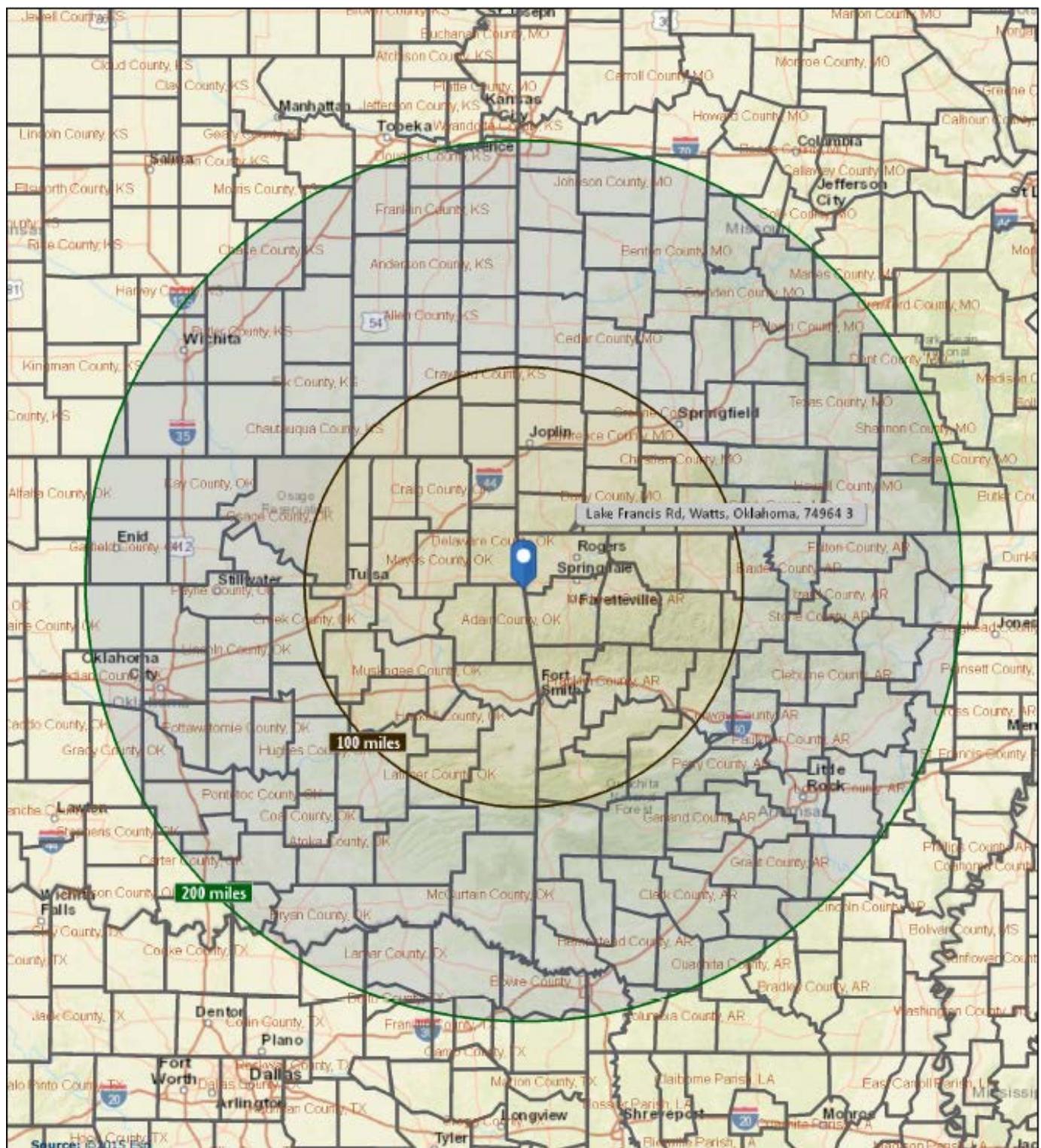
TABLE 10: ESTIMATED POOL OF WHITEWATER AND MOUNTAIN BIKING PARTICIPANTS

Estimated Pool of Whitewater and Mountain Biking Participants			
Area	Population Over 5 Years <sup>2</sup>	Mountain Biking Participation	Whitewater Kayaking
<b>Northwest Arkansas</b>	447,534	12,978	3,133
<b>100 mile radius</b>	2,216,776	64,287	15,517
<b>200 mile radius</b>	5,944,691	172,396	41,613
<b>Total</b>	8,609,001	249,661	60,263

<sup>1</sup> The researchers recognize that there are likely to be additional visitors to the park from outside a 200 mile radius ring. However, without good information about likely regional penetration rates, incorporating the larger populations from those areas leads to implausibly large visitorship estimates.

<sup>2</sup> Populations presented are not cumulative.

FIGURE 1: 100 MILE RADIUS AND 200 MILE RADIUS FROM THE PARK



Source: ESRI Business Analysis

Based on the estimates of the overall number of mountain biking and whitewater kayaking participants in the Northwest Arkansas region, and the 100 mile and 200 mile radius around the facility, researchers estimate the total number of visits from the potential visitors in the area. Using the information from the survey, researchers calculate that the average Northwest Arkansas visitor would visit the park 8.1 times a year, while those outside of Northwest Arkansas in the 100 mile and 200 mile radius would visit just once a year. The estimates further assume that just 75 percent of the pool of Northwest Arkansas whitewater kayaking and mountain biking participants would visit the park, along with 50 percent of those participants in the 100 mile radius around the park, and just 25 percent of participants from the 200 mile radius around the park.

## MOUNTAIN BIKING

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The likely visitorship estimates imply that the park would receive 78,844 visits from mountain biking participants in the Northwest Arkansas area, and an additional 32,143 visitors from the 100 mile radius around the park and 43,099 from the 200 mile radius around the park. Of these visits, 29,617 would stay overnight in Siloam Springs.

The visitorship estimates above assume that not all of the potential pool of visitors would come to the proposed park. However, an optimistic scenario is also calculated where all the participants from the potential pool visit the park. In that high visitorship case, the park would receive 105,126 annual visits from mountain bike participants in the Northwest Arkansas area, and an additional 64,287 visits from the 100 mile radius around the park and 172,396 visits from the 200 mile radius around the park. Of these visitors, 93,162 would stay overnight in Siloam Springs.

TABLE 11: LIKELY MOUNTAIN BIKING VISITS

Likely Mountain Biking Visits			
Type of Stay	Northwest Arkansas	100 mile radius	200 mile radius
<b>Northwest Arkansas Residents</b>	78,844	-	-
<b>Not Staying Overnight</b>	-	15,388	20,633
<b>Staying in Siloam Springs</b>	-	12,652	16,965
<b>Staying in Other NWA City</b>	-	4,103	5,502
<b>Total Visits</b>	78,844	32,143	43,099

## WHITEWATER KAYAKING

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An estimated 19,037 visits a year are expected from whitewater kayaking participants in the Northwest Arkansas area, while 7,759 whitewater kayaking participants are expected from 100 mile radius and 10,403 participants are expected from the 200 mile radius around the park. Of these visitors, 7,149 are expected to stay overnight in Siloam Springs.

Following the optimistic scenario described above in the mountain biking section, If all the participants from the potential pool visit the park, an estimated 25,375 visits a year are expected from whitewater participants in the Northwest Arkansas area, while 15,517 whitewater kayaking participants are expected from 100 mile radius and 41,613 participants are expected from the 200 mile radius around the park. Of these visitors, 22,487 are expected to stay overnight in Siloam Springs.

TABLE 12: LIKELY WHITEWATER KAYAKING VISITS

Likely Whitewater Kayaking Visits			
Type of Stay	Northwest Arkansas	100 mile radius	200 mile radius
<b>Northwest Arkansas Residents</b>	19,031	-	-
<b>Not Staying Overnight</b>	-	3,714	4,980
<b>Staying in Siloam Springs</b>	-	3,054	4,095
<b>Staying in Other NWA City</b>	-	990	1,328
<b>Total Visits</b>	19,031	7,759	10,403

In the likely visitorship scenario, the estimates indicate that the park can expect a total of 191,280 visits in a year from residents in Northwest Arkansas and those in the 100 mile and 200 mile radius around the park. These visitors are non-unique since Northwest Arkansas residents who participate in the mountain biking and whitewater kayaking activities are estimated as visiting the park 8.1 times. In total, the visits are expected to generate a possible 36,765 stays in Siloam Springs.<sup>3</sup> If the mountain biking features are not included in park, the total likely visitors would drop to 37,193 and generate 7,149 stays in Siloam Springs.

Assuming the more optimistic scenario where all the participants from the potential pool visit the park, the park would receive 424,314 visits in a year from residents in Northwest Arkansas and those in the 100 mile and 200 mile radius around the park. These visitors are non-unique since Northwest Arkansas residents who participate in the mountain biking and whitewater kayaking activities are estimated as visiting the park 8.1 times. These visits would generate an estimated 115,650 stays in Siloam Springs.

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<sup>3</sup> Stays are not equivalent to hotel room nights as they include all kinds of lodging, including staying with friends and family, and they do not take into account party size and accommodation sharing.

TABLE 13: LIKELY VISITS TO THE SILOAM SPRINGS WHITEWATER PARK

<b>Likely Visits to the Siloam Springs Park</b>			
<b>Type of Stay</b>	Northwest Arkansas	100 mile radius	200 mile radius
<b>Northwest Arkansas Residents</b>	97,876	-	-
<b>Not Staying Overnight</b>	-	19,102	25,613
<b>Staying in Siloam Springs</b>	-	15,706	21,059
<b>Staying in Other NWA City</b>	-	5,094	6,830
<b>Total Visits</b>	97,876	39,902	53,502

TABLE 14: OPTIMISTIC SCENARIO VISITS TO THE SILOAM SPRINGS WHITEWATER PARK

<b>Optimistic Scenario Visits to the Siloam Springs Park</b>			
<b>Type of Stay</b>	Northwest Arkansas	100 mile radius	200 mile radius
<b>Northwest Arkansas Residents</b>	130,501	-	-
<b>Not Staying Overnight</b>	-	38,204	102,451
<b>Staying in Siloam Springs</b>	-	31,412	84,238
<b>Staying in Other NWA City</b>	-	10,188	27,320
<b>Total Visits</b>	130,501	79,804	214,009

## LIKELY VISITOR SPENDING ESTIMATES

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The spending patterns of potential visitors to the proposed mountain biking and whitewater kayaking park is calculated using the likely number of visitors to the park that was estimated in the previous section and the spending patterns of visitors estimated from the results of the surveys of potential visitors. The spending patterns of likely visitors are estimated separately for the spending that would occur at the proposed park and the spending that would occur outside the park in the city of Siloam Springs itself.

The concession spending estimates generated provide an estimate for potential concession operators and the City of Siloam Springs about the likely revenue that can be generated by concession operations at the proposed park. It is important to note that since the park is situated in Oklahoma, no sales taxes collected would accrue to the City of Siloam Springs. If the park is developed without concessions like kayak or mountain bike rental, it is likely that patrons will rent from outfitters elsewhere and the sales tax dollars will accrue in those municipalities.

The likely Northwest Arkansas residents are estimated to spend \$1.33 million on concessions at the park. Visitors from within the 100 mile radius around the park are expected to spend an additional \$0.59 million, while visitors from with the 200 mile radius are expected to spend \$0.80

million. In total, likely concession sales are estimated to amount to \$2.73 million per year. If the mountain biking features are not included in park and only kayaking visitors are considered, the concession sales would drop to \$539,962.

In the optimistic scenario presented where all the participants from the potential pool visit the park, Northwest Arkansas residents are estimated to spend \$1.78 million on concessions at the park. Visitors from within the 100 mile radius around the park are expected to spend an additional \$1.19 million, while visitors from with the 200 mile radius are expected to spend \$3.19 million. In total, potential concession sales could amount to \$6.12 million per year under these extremely positive conditions.

TABLE 15: CONCESSION SPENDING OF LIKELY VISITORS

Concession Spending of Likely Visitors			
Type of Stay	Northwest Arkansas	100 mile radius	200 mile radius
<b>NWA Residents</b>	\$1,334,046	-	-
<b>Not Staying Overnight</b>	-	\$171,727	\$230,259
<b>Staying in Siloam Springs</b>	-	\$368,151	\$493,632
<b>Staying in Other NWA City</b>	-	\$54,555	\$73,150
<b>Total</b>	\$1,334,046	\$594,433	\$797,041

Spending outside the park in Siloam Springs is expected to occur at area restaurants, hotels, motels, gas stations, bars, liquor stores and other amenities in the city. The Northwest Arkansas residents who visit the park are expected to spend \$1.21 million in Siloam Springs over the course of their visits in one year. Spending from visitors to the park from the 100 mile radius is estimated at \$2.67 million and spending from visitors from the 200 mile radius is estimated at \$3.58 million. In total, spending in Siloam Springs from all likely visitors to the proposed mountain biking and whitewater kayaking park is estimated at \$7.45 million. With a 2.0 percent sales tax, the city can expect to collect as much as \$149,050 from the spending by visitors. If the mountain biking features are not included in park, the likely visitor spending in Siloam Springs would drop to \$1.45 million and generate \$28,982 in sales tax collections.

These numbers increase substantially when the optimistic scenario is considered. If all the participants from the potential pool visit the park, Northwest Arkansas residents who visit the park are expected to spend \$1.61 million in Siloam Springs over the course of their visits in one year. Spending from all potential visitors to the park from the 100 mile radius is estimated at \$5.33 million and spending from visitors from the 200 mile radius is estimated at \$14.30 million. In total, spending in Siloam Springs from all potential visitors to the proposed mountain biking and whitewater kayaking park would be as much as \$21.25 million. With a 2.0 percent sales tax, the city would collect as much as \$425,006 from the spending by visitors.

TABLE 16: NON-CONCESSION SPENDING OF POTENTIAL VISITORS

<b>Non-Concession Spending of Potential Visitors in Siloam Springs</b>			
<b>Type of Stay</b>	Northwest Arkansas	100 mile radius	200 mile radius
<b>NWA Residents</b>	\$1,209,743		
<b>Not Staying Overnight</b>	-	\$259,023	\$347,309
<b>Staying in Siloam Springs</b>	-	\$2,280,525	\$3,057,823
<b>Staying in Other NWA City</b>	-	\$127,347	\$170,752
<b>Total</b>	\$1,209,743	\$2,666,895	\$3,575,883

## EXISTING TOURISM CAPACITY IN SILOAM SPRINGS

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As the proposed whitewater and mountain biking park draws in new visitors to Siloam Springs, the spending of these visitors would positively impact area tourism amenities such as restaurants and hotels and motels in the city. Spending by visitors to the park from other Northwest Arkansas cities, and visitors from within a 100 mile and 200 mile radius of the park is likely to be around \$7.45 million and under the most optimistic scenario could be as much as \$21.25 million per year. The survey results are not detailed enough to break this spending numerically into specific categories , but a significant portion of the expenditures by visitors would occur at restaurants, hotels, and motels, while other retail categories like gas stations, liquor stores, and bars would also receive spending from the visitors.

### HOTELS

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The potential of the City of Siloam to capture the spending of the visitors to the proposed park depends on the existing stock of tourism amenities in the city. Working with the City of Siloam Springs, researchers from the Center for Business and Economic Research have compiled a list of tourism ready hotels in Siloam Springs that could expect to capture the spending of those who plan to stay in Siloam Springs when they visit the park. There are currently two such hotels operating in Siloam Springs, with one additional hotel expected to begin operations in April 2016. Taken together, these three hotels offer 205 rooms, for a total of 74,825 room-nights each year.

Estimates from the survey indicate that likely visitors to the park from within the 100 mile radius would occupy 1,759 room-nights and visitors from within the 200 mile radius would occupy 2,359 room-nights. In total, visitors to the park can be expected to occupy 4,118 room-nights or 5.5 percent of the existing stock, if the visits are spread out evenly through the year. However, as a lot of these visits are expected to occur when the weather is ideal for whitewater kayaking and mountain biking, the 205 rooms in Siloam Springs may not be sufficient and visitors will stay in another Northwest Arkansas city, taking their associated spending out of Siloam Springs as well. In addition to these caveats, survey respondents may also stay at the hotel and casino hotel in neighboring West Siloam Springs, Oklahoma, as they may not differentiate between the two cities in their spending patterns, despite those hotels not being listed on the survey instrument (by intention). However, if all the 4,118 room-nights are captured in hotels within the actual city of Siloam Springs, the stays are estimated to generate revenues of \$429,150 to the hotels and motels in Siloam Springs, based on a \$104.22 per room-night charge. Accordingly, the city could collect as much as \$8,583 in revenue via the two percent hotel and motel tax, levied on room nights.

Under the optimistic visitorship scenario, if all the potential visitors from the 100 mile and 200 mile radius visit the park, then visitors from the 100 mile radius would occupy 3,518 room-nights and visitors from within the 200 mile radius would occupy an addition 9,435 room-nights. In total, all the potential visitors to the park under this high level of visitorship would occupy 12,953 room-

nights or 17.3 percent of the existing stock, if the visits are spread out evenly through the year. The potential revenue generated for hotels and motels from these stays would amount to \$1.35 million and the city would collect \$26,999 in hotel and motel taxes using the higher visitorship estimates.

TABLE 17: EXISTING HOTELS AND MOTELS IN SILOAM SPRINGS

Existing Hotels and Motels in Siloam Springs	
Name	Standard Rooms
Hampton Inn	66
Quality Inn	59
Holiday Inn Express*	80
Total	205

\*Expected in April 2016

TABLE 18: HOTEL ROOM-NIGHTS OCCUPIED BY LIKELY VISTORS

Hotel Room-Nights Occupied By Likely Visitors		
Type of Stay	100 mile radius	200 mile radius
Staying in Siloam Springs	1,759	2,359
Hotel/Motel Spending	\$149,522	\$200,485

## RESTAURANTS

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According to records compiled by the Center for Business for Economic Research, there were 60 restaurants operating in Siloam Springs in April 2016.<sup>4</sup> These restaurants are an important tourism amenity for visitors to the proposed whitewater and mountain biking park. Results of the survey indicate that likely visitors from the 100 mile radius around the park would consume as many as 92,823 meals in Siloam Springs among breakfast, lunch, and dinner. In addition, visitors from within the 200 mile radius in Siloam Springs would consume 124,461 meals among breakfast, lunch, and dinner.

Using the higher visitorship number in the optimistic scenario, if all the potential visitors from the 100 mile and 200 mile radius visit the park, then visitors from the 100 mile radius around the park could consume as many as 185,646 meals in Siloam Springs between breakfast, lunch, and dinner. In addition, visitors from within the 200 mile radius in Siloam Springs could consume 497,844 meals between breakfast, lunch, and dinner.

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<sup>4</sup> Restaurants open and close regularly. This list may not be exhaustive, but is representative of the current restaurant tourism capacity of Siloam Springs.

TABLE 19: EXISTING RESTAURANTS IN SILOAM SPRINGS

Existing Restaurants in Siloam Springs		
28 Springs	Hawg City Grill	Sabor Latino
Angelinos Italian Restaurant	Hunan Village	Short Stop Corner
Arby's 5397	Inn at the Springs	Siloam Café
Arkoma Lanes/ Community Bowl	Jim's Razorback Pizza	Sonic
Asian Chef	Kentucky Fried Chicken	Soup And Salad Buffet
Barnetts Dairyette	Kung Fu Egg Roll	Subway 10281
Benton County Sale Barn Restaurant	La Hacienda de los Reyes	Subway 51934/ Mama De Luca's
Birra Vino's Pizzeria	La Huerta	Taco Bell 542
Braum's 222	Las Delicias Bakery	Taco Suave
Café On Broadway	Little Caesar's	Taqueria El Rancho
Callahan's Steak House	Long John Silvers	Taqueria Jalisco
Casey's General Store	Mama De Luca's Pizza	Thai City
Cathy's Corner	Mazzio's Pizza C8	Thai Café
Daylight Donuts	McDonalds 28815	The Hog Pit
Dickey's BBQ	McDonald's 34663	TJ'S Pizza & Chicken
Domino's Pizza	MI Tienda Supermarket	Waffle House
Eureka Pizza	Panaderia Bakery	Wendy's
Fatigas Sub Station	Panda Express	Zaxbys
Field House Station Sunshine Store	Pizza Hut 2614	
Fratelli's Wood-Fired Pizza	Pour Jon's	
Hardee's 1500502	Rib Crib	

TABLE 20: MEALS EATEN BY LIKELY VISTORS

Meals Eaten By Likely Visitors		
Type of Stay	100 mile radius	200 mile radius
Breakfast	26,386	35,380
Lunch	25,915	34,748
Dinner	40,522	54,333
Total	92,823	124,461

## CURRENT AND POTENTIAL TAX COLLECTIONS IN SILOAM SPRINGS

Spending from the visitors to the proposed whitewater and mountain biking park in Siloam Springs would provide additional sales tax revenues for the City of Siloam Springs. Current sales tax collections of two percent generated revenues of \$6.72 million in 2015. On average, since 2005, sales tax revenues have grown 2.9 percent annually, although in the 2014 and 2015 the sales tax revenues grew by 6.8 percent and 7.2 percent. The chart below shows the growth in sales tax collections since 2005.

FIGURE 2: SILOAM SPRINGS SALES TAX COLLECTIONS



Source: City of Siloam Springs

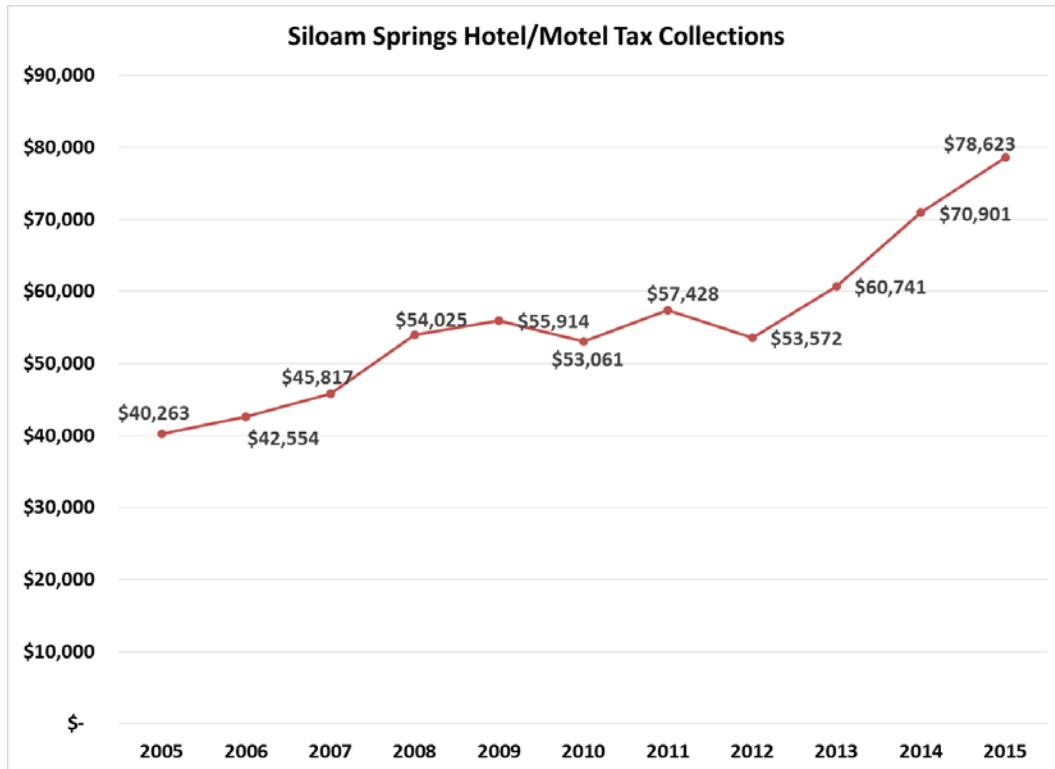
Likely visitors to the park from other Northwest Arkansas cities are estimated to spend \$1.21 million in Siloam Springs, which would generate \$24,195 in annual sales tax revenues. Likely visitors who come from within the 100 mile radius would spend an estimated \$2.67 million, generating \$53,338 in sales tax revenues, while visitors from within the 200 mile radius would spend an estimated \$3.58 million and generate \$71,518 in sales tax revenues for the city. In total, likely visitors to the park would increase sales tax revenues by \$149,050, or an amount equal to 2.2 percent of the 2015 sales tax collections. It is important to note that most of the two percent sales tax collected in Siloam Springs is earmarked for special categories like capital improvements, waste water treatment bonds, police, fire, streets, etc. Only ten percent of the sales tax collections due to the whitewater park visitors would be available for general funds

appropriations. That would imply, that of the additional \$149,050 that could be collected from park visitors, only \$14,905 will be available to be appropriated towards maintenance and operations of the park.

Using the more optimistic scenario, if all the participants from the potential pool visit the park, visitors to the park from other Northwest Arkansas cities could spend up to \$1.61 million in Siloam Springs, which would generate \$32,260 in sales tax revenues. Visitors who come from within the 100 mile radius could spend \$5.33 million, generating \$106,676 in sales tax revenues, while visitors from within the 200 mile radius could spend \$14.30 million and generate \$286,071 in sales tax revenues for the city. In total, using the high visitorship estimates in the optimistic scenario, visitors to the park would increase sales tax revenues by \$425,006, or 6.3 percent of the 2015 sales tax collections. Of this amount, only \$42,501 would be available to be appropriated towards maintenance and operations of the park.

The City of Siloam Springs has a two percent hotel and motel tax that funds parks in the city. As the proposed whitewater and mountain biking park draws in visitors who stay in Siloam Springs hotels and motels, the associated tax collections would increase inasmuch as current capacity is not fully utilized. Current hotel and motel tax collections of two percent generated revenues of \$78,623 in 2015. On average, since 2005, hotel and motel tax revenues have grown 7.2 percent annually, although in 2014 and 2015 the sales tax revenues grew by 16.7 percent and 10.9 percent, respectively. The chart below shows the growth in the hotel and motel tax collections since 2005.

FIGURE 3: SILOAM SPRINGS HOTEL AND MOTEL TAX COLLECTIONS



Source: City of Siloam Springs

In total, likely visitors to the park can be expected to occupy 4,118 room-nights or 5.5 percent of the existing stock, if the visits are spread out evenly through the year. These stays would generate revenues of \$429,150 to the hotels and motels in Siloam Springs, based on a \$104.22 per room-night charge. The city would also collect \$8,583 via the two percent hotel and motel taxes, which represents 10.9 percent of the total 2015 hotel and motel tax collection.

Considering the optimistic scenario, if all the potential visitors from the 100 mile and 200 mile radius visit the park, then visitors from the 100 mile radius would occupy 3,518 room-nights and visitors from within the 200 mile radius would occupy an addition 9,435 room-nights. In total, all the potential visitors to the park can be expected to occupy 12,953 room-nights or 17.3 percent of the existing stock, if the visits are spread out evenly through the year. The potential revenue generated for hotels and motels from these stays would amount to \$1.35 million and the city would collect \$26,999 in hotel and motel taxes or 34.3 percent of total 2015 hotel and motel tax collection.

## SUMMARY OF RESULTS

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The proposed whitewater and mountain biking park will prove to be an important recreational amenity for the City of Siloam Springs and the Northwest Arkansas region. While it is not possible to effectively calculate the true value of the park as a regional amenity, this study provides estimates of the potential numbers of visitors to the park and their associated spending in Siloam Springs. These numbers will allow leaders at the City of Siloam Springs and the Walton Family Foundation to make informed decisions about the operations of such a park. In this study, the overall number of likely annual visits to the proposed park is estimated at 191,280. 97,876 of these visits come from whitewater kayaking and mountain biking participants in Northwest Arkansas. It is assumed that 75 percent of the pool of Northwest Arkansas participants would each visit the park 8.1 times in a year. 93,404 whitewater kayaking and mountain biking participants from within the 100 mile and 200 mile radius of the park are likely to visit the park once. These visitors represent 50 percent of the whitewater kayaking and mountain biking participants from the 100 mile radius and 25 percent of the participants from the 200 mile radius. If the mountain biking features are not included in the park, the total visitors for whitewater kayaking would be 37,193. Under an extremely optimistic scenario, if all the potential visitors from Northwest Arkansas visited the park 8.1 times each and all the potential visitors from the 100 mile and 200 mile radius come to the park once, the overall attendance would increase to 424,314.

Overall spending in Siloam Springs from the likely 191,280 visits is estimated to generate \$7.45 million annually. \$1.21 million of this spending comes from likely visitors who are residents of other Northwest Arkansas cities, while \$6.24 million is generated by likely visitors from within the 100 mile and 200 mile radius of the park. Sales tax revenues of \$149,050 would accrue to the City of Siloam Springs from these visits, of which \$14,095 will be available to be appropriated towards maintenance and operations of the park. Hotel/motel tax revenues of \$8,583 would also accrue to the City of Siloam Springs from these visits. The likely visitors to the park are also estimated to spend \$2.74 million on concessions at the park. If the mountain biking features are not included and only kayaking visitors are considered, likely visitor spending in Siloam Springs would drop to \$1.45 million and likely concession spending would drop to \$529,962. However, if all the potential visitors from Northwest Arkansas visited the park 8.1 times each and all the potential visitors from the 100 mile and 200 mile radius come to the park once, the overall spending in Siloam Springs would increase to \$21.25 million, sales tax revenues accrued would rise to \$425,006 (of which only \$42,501 would be available to be appropriated towards maintenance and operations of the park), hotel/motel taxes accrued would rise to \$26,999, and concessions spending would increase to \$6.16 million under the most optimistic scenario..

TABLE 21: VISITORSHIP AND SPENDING ESTIMATES

<b>Visitorship and Spending Estimates</b>			
<b>Category</b>	Likely Visitor Estimate	Optimistic Visitor Estimate	Kayaking Park Visitors Only
<b>Visits from Other Northwest Arkansas Cities</b>	97,876	130,501	19,031
<b>Visits from within 100 mile and 200 mile radius</b>	93,404	293,813	18,162
<b>Total Visits</b>	191,280	424,314	37,193
<b>Spending in Siloam Springs</b>	\$7,452,522	\$21,250,314	\$1,449,101
<b>Siloam Springs Sales Tax Revenues</b>	\$149,050	\$425,006	\$28,982
<b>Siloam Springs Hotel/Motel Tax Revenues</b>	\$8,583	\$26,999	\$1,669
<b>Concession Sales at the Park</b>	\$2,725,520	\$6,155,757	\$529,962

## SOURCES

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Hagenstad, Marca et al. *Preliminary Evaluation of the Beneficial Value of Waters Diverted in the Clear Creek Whitewater Park in the City of Golden.* Stratus Consulting, Inc., 2000

*List of Hotels, Motels, and Restaurants.* Center for Business and Economic Research, 2016

McNutt, Crystal. *2005-2015 Hotel and Motel Tax Collections.* City of Siloam Springs, 2016

Watkins, Scott and Bowers, Sara. *Economic Benefits of Grand Rapids Whitewater Project.* Anderson Economic Group, 2014

Williams, Kimberly. *2005-2015 Sales Tax Collections.* City of Siloam Springs, 2016

## APPENDIX

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### POTENTIAL VISITOR SURVEY INSTRUMENT

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The City of Siloam Springs, in partnership with the Walton Family Foundation and other entities, is developing plans for a new whitewater kayaking and mountain biking park. The park is expected to be developed at the old Lake Frances dam (Google Maps link: <https://goo.gl/maps/XiT7KT1e95C2>) and will feature international race class whitewater kayaking, mountain biking trails, parking, picnic tables, and other amenities. The city is working with the Center for Business and Economic Research to understand the demand for such an amenity near Siloam Springs and the associated spending patterns of visitors to the proposed whitewater kayaking and mountain biking park.

This survey will give officials at the City of Siloam Springs an understanding of the potential revenue generated by this proposed development and as such your responses to this survey are very important. Please provide your best estimates for the questions regarding your spending patterns, if you would choose to visit the proposed development.

Should you choose to participate in this survey; all information will be kept confidential to the extent allowed by law and University policy. No personally identifying information will be used in any publication resulting from this research. You are under no obligation to answer any particular question, and you may cease participation at any time. This study is being conducted under the guidelines of the Institutional Review Board at the University of Arkansas and you should feel free to contact Iroshi Windwalker, Compliance Coordinator, (irb@uark.edu) if you have any concerns.

If you have any questions on completing the survey, please email Mervin Jebaraj at [mjebara@uark.edu](mailto:mjebara@uark.edu) or call at 479-575-6077.

In what state do you currently reside?

In what city and county do you reside?

City

County

How likely are you to visit the proposed Siloam Springs Whitewater and Mountain Biking Park?

Very Likely   Likely      Neutral      Not Likely   Very Unlikely



## Spending

If the proposed Siloam Springs Whitewater and Mountain Biking Park were to open, how many times a year would you likely visit?

Number

When you travel to places like the proposed Siloam Springs Whitewater and Mountain Biking Park, how many people are typically in your party (how many people will you share a car, accommodations, meals with)?

Number

What amenities are you most interested in at the proposed Siloam Springs Whitewater and Mountain Biking Park?

### Interest

- |                 |   |
|-----------------|---|
| Kayaking        | <input type="checkbox"/> Kayaking Interest        |
| Mountain Biking | <input type="checkbox"/> Mountain Biking Interest |
| Disc Golf       | <input type="checkbox"/> Disc Golf Interest       |
| Hiking Trails   | <input type="checkbox"/> Hiking Trails Interest   |

What concessions might your party be interested in purchasing at the proposed Siloam Springs Whitewater and Mountain Biking Park?

### Siloam Springs

- |   |   |
|---|---|
| Snacks and beverages                      | <input type="checkbox"/> Snacks and beverages Siloam Springs                      |
| Meals                                     | <input type="checkbox"/> Meals Siloam Springs                                     |
| Rent kayaks and related equipment         | <input type="checkbox"/> Rent kayaks and related equipment Siloam Springs         |
| Rent mountain bikes and related equipment | <input type="checkbox"/> Rent mountain bikes and related equipment Siloam Springs |
| Parking                                   | <input type="checkbox"/> Parking Siloam Springs                                   |

What is the total amount your party is likely to spend on concessions at the proposed Siloam Springs Whitewater and Mountain Biking Park?

If you travel to the proposed Siloam Springs Whitewater and Mountain Biking Park, would you likely stay overnight in:

- Siloam Springs
- Other Northwest Arkansas city
- Not stay overnight

What is the TOTAL amount (excluding concessions at the proposed development) YOUR PARTY would likely spend in Siloam Springs on a potential trip?

Spending in NWA

If your party would stay overnight in Northwest Arkansas, please indicate the number of nights for each applicable type of accommodation. If your party is staying in a hotel/motel or in a RV park, please specify the number of rooms/sites your party is occupying each night.

	Number of Rooms/ Sites	Number of Nights
Hotel/ Motel	<input type="text"/> Hotel/ Motel Number of Rooms/ Sites	<input type="text"/> Hotel/ Motel Number of Nights
Other	<input type="text"/> Other Number of Rooms/ Sites	<input type="text"/> Other Number of Nights

Approximately how many times is your party likely to purchase meals in other Northwest Arkansas restaurants?

	Breakfast (# of times)	Lunch (# of times)	Dinner (# of times)
Meals eaten by party	<input type="text"/> Meals eaten by party Breakfast (# of times)	<input type="text"/> Meals eaten by party Lunch (# of times)	<input type="text"/> Meals eaten by party Dinner (# of times)

Please indicate which of these your party would likely do in in other Northwest Arkansas cities

**Northwest Arkansas**

- |                          |   |
|--------------------------|---|
| Purchase Fuel            | <input type="checkbox"/> Purchase Fuel Northwest Arkansas                       |
| Retail Shopping          | <input type="checkbox"/> Retail Shopping Northwest Arkansas                     |
| Buy Groceries            | <input type="checkbox"/> Buy Groceries Northwest Arkansas                       |
| Purchase Packaged Liquor | <input checked="" type="checkbox"/> Purchase Packaged Liquor Northwest Arkansas |
| Rent a Vehicle           | <input type="checkbox"/> Rent a Vehicle Northwest Arkansas                      |
| Use a Taxi               | <input type="checkbox"/> Use a Taxi Northwest Arkansas                          |
| See a Movie              | <input type="checkbox"/> See a Movie Northwest Arkansas                         |
| Go to a Bar              | <input type="checkbox"/> Go to a Bar Northwest Arkansas                         |

What is the TOTAL amount (excluding concessions at the proposed development) YOUR PARTY would likely spend in Siloam Springs on a potential trip?

What is the TOTAL amount (excluding concessions at the proposed development) YOUR PARTY would likely spend in other Northwest Arkansas cities on a potential trip?

Spending in Siloam

If your party would stay overnight in Siloam Springs, please indicate the number of nights for each applicable type of accommodation. The following hotels/motels are in Siloam Springs: Best Value, Hampton Inn, Hereford Motel, Holiday Inn Express, Stone Inn's, Super 7 Inn, and Super 8 Motel.

	Number of Rooms/ Sites	Number of Nights
Hotel/ Motel	<input type="text"/> Hotel/ Motel Number of Rooms/ Sites	<input type="text"/> Hotel/ Motel Number of Nights
Other	<input type="text"/> Other Number of Rooms/ Sites	<input type="text"/> Other Number of Nights

Approximately how many times is your party likely to purchase meals at Siloam Springs restaurants?

	Breakfast (# of times)	Lunch (# of times)	Dinner (# of times)
Meals eaten by party	<input type="text"/> Meals eaten by party Breakfast (# of times)	<input type="text"/> Meals eaten by party Lunch (# of times)	<input type="text"/> Meals eaten by party Dinner (# of times)

Please indicate which of these your party would likely do in Siloam Springs

Siloam Springs

Purchase Fuel  Purchase Fuel Siloam Springs

Retail Shopping  Retail Shopping Siloam Springs

Buy Groceries  Buy Groceries Siloam Springs

Purchase Packaged Liquor  Purchase Packaged Liquor Siloam Springs

Rent a Vehicle  Rent a Vehicle Siloam Springs

Use a Taxi  Use a Taxi Siloam Springs

See a Movie  See a Movie Siloam Springs

Go to a Bar  Go to a Bar Siloam Springs

What is the TOTAL amount (excluding concessions at the proposed development) YOUR PARTY would likely spend in Siloam Springs on a potential trip?